

Dear xxxx

Jean and I are looking forward to seeing you in a few weeks.

I wanted to let you know that we're starting a new initiative for 2019 to help our clients prepare for the unexpected. We want to support you in having all of your financial records organized and accessible while enabling us to most helpfully assist you and your family in the event of an incapacity, death, or other transition.

At our upcoming meeting, we'll be reviewing the attached Financial Directive. If you can come prepared with the names and contact information of people you'd like to be contacted in the event of the circumstances described in the directive, that would be wonderful. We'll of course fully discuss the document and can answer any questions before finalizing it. No one is required to complete the Financial Directive, but we're encouraging all of our clients to do so.

We'll also be sharing with you a financial information organizational tool. You may already have all of your financial information organized in a format that's secure and easily accessible for loved ones. If so, that's wonderful. If not, we're hoping the Life Goes On Roadmap will be the tool that helps you get that done. It's designed to provide a fun, engaging format that empowers and motivates you to gather all those records in one place!

We have the Life Goes On Roadmap available in both digital or printed binder format. As a retainer client, you can choose either or both formats at no charge. You can let us know in the meeting which format fits your style the best. We're also happy to provide the digital version for any of your friends or family members who might find it helpful.

I hope knowing about these agenda items in advance is helpful. Please feel free to reach out in advance if there's anything you'd like to discuss before we meet. See you soon!

Warmest regards,  
Patty

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